Flowcharting Standards – Please use ONLY the symbols shown below, following these guidelines:
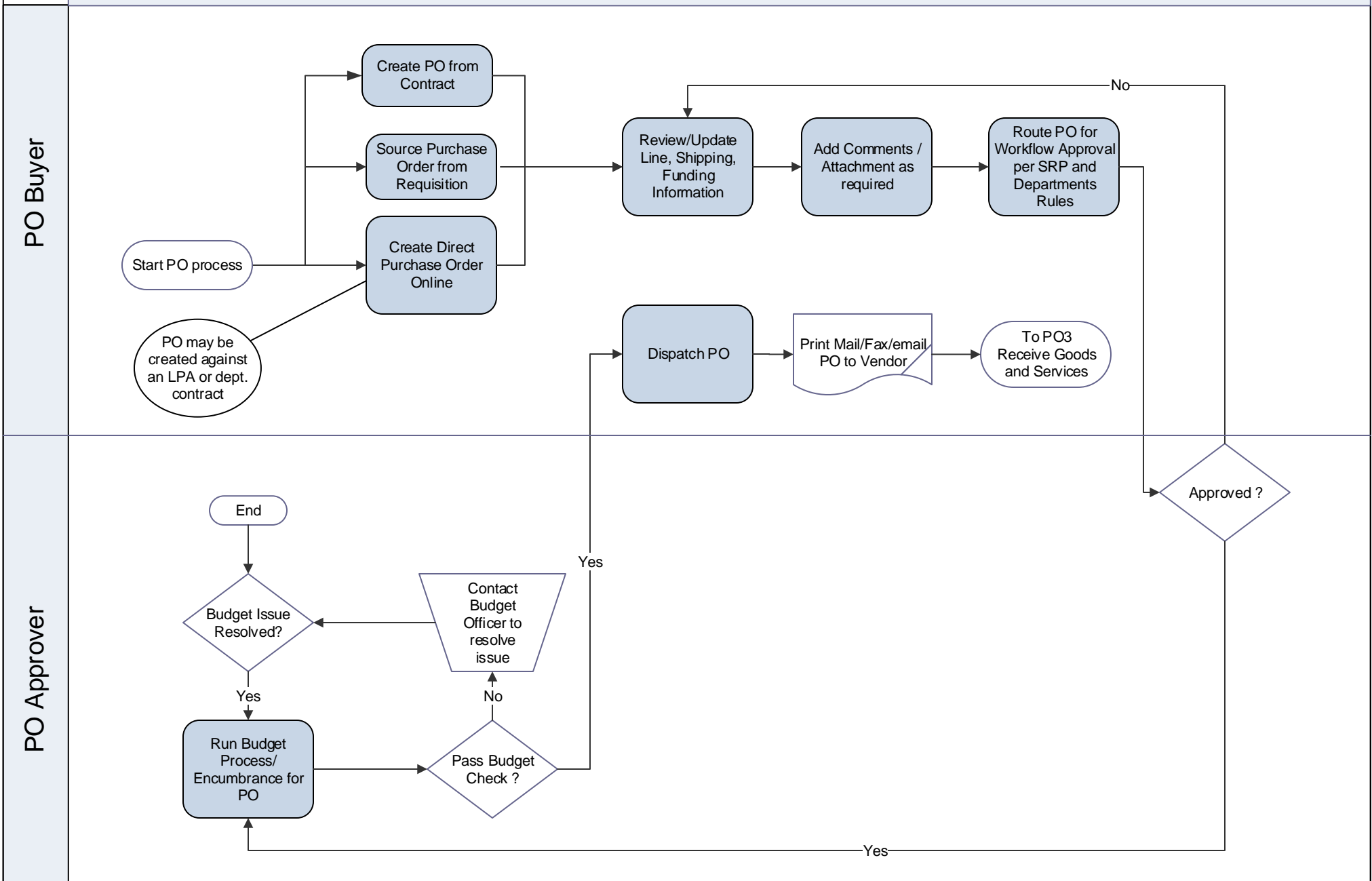
Template Key

Start/End - Indicates point at which the process begins or ends. Does not represent any activity.

Decision - shows a decision point, such as yes/no. Each path emerging from the diamond must be labeled with one of the possible answers.

System Task - Represents an individual step or activity in FI$Cal.

Manual Task - Represents an individual step or activity in the process that is made out of FI$Cal.

Input Documents – A paper document (or email) that is used for entering data in the process. For electronic data should be use the Interface shape.

Connector - On/Off-Page Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. Connectors are labeled with UPPER CASE letters.

Interface – Data conversion from one electronic system to another.

Batch Process - Represents a batch process within FI$Cal. Use a verb phrase (Process Invoice) NOT a noun phrase (Invoice Processing) to describe the step.

Flow Arrow

Intra Integration Process - A input or Output to some other process within the same capability

Output Documents - An electronic document that is created by the process and can be printed (for example – any kind of report).

Role

Swim lanes used to indicate which user role has primary responsibility for performing steps in the process. If an activity involves participation by more than one role, place it in the swim lane for the role with primary responsibility, or put it on the line that divides both roles.

FI$Cal
Financial Information System for California

Manage Purchase Order

PO Buyer

Start PO process

PO may be created against an LPA or dept. contract

Create PO from Contract

Source Purchase Order from Requisition

Create Direct Purchase Order Online

Review/Update Line, Shipping, Funding Information

Add Comments / Attachment as required

Route PO for Workflow Approval per SRP and Departments Rules

No

Dispatch PO

Print Mail/Fax/email PO to Vendor

To PO3 Receive Goods and Services

PO Approver

Approved ?

End

Budget Issue Resolved?

Contact Budget Officer to resolve issue

Yes

Yes

Run Budget Process/ Encumbrance for PO

Pass Budget Check ?

No

Yes

FI$Cal
The Next Generation
Financial Information System for California

Manage PO Change Order

PO Buyer

Start → Create PO Change Order → Enter / Update / Cancel PO Lines → Change needs Re-Approval

Change needs Re-Approval — No → Re Budget Check Required?

Change needs Re-Approval → Route PO for Approval

Route PO for Approval

Re Budget Check Required? — No → End

Re Budget Check Required? — Yes → A

Dispatch PO → Print Mail/Fax/email PO to Vendor → To PO6 Receive Goods and Services

End

No → Create PO Change Order

PO Approver

A → Run Budget process → Pass Budget Check?

Pass Budget Check? — Yes → Approved

Pass Budget Check? — No → Contact budget officer to resolve issue → Budget issue Resolved

Budget issue Resolved — Yes → Run Budget process

Budget issue Resolved — No → End

Approved — Yes → Dispatch PO

Approved → Route PO for Approval

FI$Cal
Financial Information System for California